

## Customer Service Experience Project Summary of Customer Service Initiatives

### Existing/Scheduled

Initiatives listed in this section have already been approved for implementation and are either in progress or undergoing additional planning.

Title/Description	Business Owner	Primary Stakeholders	Status
<b>Self-Service Requests for Duplicate Tax Statements.</b> Provide customers the option to produce their own duplicate tax statement (1099R) via the Internet or IVR. In the current environment, customers request tax statements over the phone or through a written request, and must wait several days to receive the statement through the mail. This initiative would give customers self-serve access to download their tax statement.	BNSD	BNSD, CSED, ITSB, PAOF.	This is an existing initiative. Analysis and development are currently underway. Deployment could be as early as 12/31/06.
<b>Online Service Retirement Applications.</b> Give members the choice of completing and submitting service retirement applications via the Internet. In the current environment, members submit hard copy applications through the mail. Applications are then scanned and indexed to the workflow system. This initiative gives members the option for electronic submission regardless of the time of day.	BNSD	BNSD, OSSD, ITSB, CSED, PAOF.	This is an existing initiative that is being implemented in phases. By 6/30/07, members will be able to complete the application online, print it at home, and submit via paper. By 6/30/08, members will be able to complete and submit the application via the Internet.
<b>Customer Education Solution (CES) Project.</b> CES will enable our members and employers to view educational materials online. CES will improve customer flexibility by customizing materials to meet individual needs and by providing 24/7 access. CES will also allow CalPERS to serve its members and employers in a more cost effective manner.	CSED	CSED, ERSD, MBSD, PAOF, ITSB,	CES is an existing initiative. Implementation is planned for early 2007.

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<b>eSubscriptions for Employer Broadcast Messaging.</b> Convert the Broadcast Message Service for employers from a mailing list subscription to fully automated eSubscription Service, similar to eNews, ePress and eAgenda Alerts. This initiative would improve the customer's online experience and enable the customer to manage his/her own subscription rather than requiring help from CalPERS to request changes.	PAOF	ERSD, PAOF, ITSB.	This is an existing initiative with implementation anticipated by October 2006.
<b>Online Access to Direct Deposit Advices.</b> Payees with electronic fund transfer will be able to view their direct deposit advice (check stub), historical warrant data, and deductions online. CalPERS will save money on printing and postage to the extent customers opt out of receiving paper statements. Contact Center staff may realize a reduction of requests for current and historical warrant data.	BNSD	BNSD, CSED, ITSB, PAOF.	This is an existing initiative. Implementation is scheduled for the end of 2006.
<b>Change Your Address/IVR.</b> Allowing members to change their address using Interactive Voice Response (IVR) will enhance the customer experience. This service is already available on CalPERS' website; adding this functionality to the IVR will expand customer choice. Active and retired members will be able to change their address using IVR by calling the Customer Contact Center's toll free phone number. The customer's identity will be authenticated using the same personal information they provide when calling a phone agent. Last fiscal year, the Customer Contact Center received approximately 52,000 calls from members wanting to change their address. Adding this service will alleviate the need for a caller to speak to a CalPERS representative, saving time for both the contact center and the customer.	CSED	CSED, ITSB	This is an existing initiative.